


Form 990



Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public

▶ Information about Form 990 and its instructions is at www.irs.gov/form990

OMB No 1545-0047

2014

Open to Public Inspection

A For the 2014 calendar year, or tax year beginning 01-01-2014 , and ending 12-31-2014

| | | | |
|---|---|--|---|
| B Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending | C Name of organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | | D Employer identification number 86-0597661 |
| | Doing business as GOLDWATER INSTITUTE | | |
| | Number and street (or P O box if mail is not delivered to street address) | Room/suite | E Telephone number (602) 462-5000 |
| | 500 EAST CORONADO ROAD | | |
| | City or town, state or province, country, and ZIP or foreign postal code PHOENIX, AZ 850041543 | | G Gross receipts \$ 6,399,484 |
| F Name and address of principal officer MS DARCY OLSEN 500 E CORONADO ROAD PHOENIX, AZ 850041543 | | | |
| I Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () ◀ (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527 | | H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| J Website: ▶ WWW.GOLDWATERINSTITUTE.ORG | | H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions) | |
| | | H(c) Group exemption number ▶ | |

| | | |
|--|---------------------------------|-------------------------------------|
| K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ | L Year of formation 1988 | M State of legal domicile AZ |
|--|---------------------------------|-------------------------------------|

Part I

Summary

| | | | | |
|-----------------------------|------------|--|----------------------------------|---------------------|
| Activities & Governance | 1 | Briefly describe the organization's mission or most significant activities THE GOLDWATER INSTITUTE DRIVES RESULTS BY WORKING DAILY IN COURTS, LEGISLATURES, AND COMMUNITIES THE GOLDWATER INSTITUTE DRIVES RESULTS BY WORKING DAILY IN COURTS, LEGISLATURES, AND COMMUNITIES TO DEFEND AND STRENGHTEN THE FREEDOM GUARANTEED TO ALL AMERICANS IN THE CONSTITUTIONS OF THE UNITED STATES AND ALL FIFTY STATES | | |
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| | | | | |
| | | | | |
| | | | | |
| | 2 | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets | | |
| | 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | 14 |
| | 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 13 |
| | 5 | Total number of individuals employed in calendar year 2014 (Part V, line 2a) | 5 | 60 |
| | 6 | Total number of volunteers (estimate if necessary) | 6 | 38 |
| | 7a | Total unrelated business revenue from Part VIII, column (C), line 12 | 7a | 0 |
| | b | Net unrelated business taxable income from Form 990-T, line 34 | 7b | 0 |
| Revenue | 8 | Contributions and grants (Part VIII, line 1h) | Prior Year | Current Year |
| | 9 | Program service revenue (Part VIII, line 2g) | 4,196,797 | 4,739,590 |
| | 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 75,953 | 130,274 |
| | 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 80,755 | 80,289 |
| | 12 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 96,596 | 99,107 |
| | 12 | Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 4,450,101 | 5,049,260 |
| Expenses | 13 | Grants and similar amounts paid (Part IX, column (A), lines 1–3) | 0 | 0 |
| | 14 | Benefits paid to or for members (Part IX, column (A), line 4) | 0 | 0 |
| | 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10) | 2,622,371 | 3,180,923 |
| | 16a | Professional fundraising fees (Part IX, column (A), line 11e) | 78,671 | 172,890 |
| | b | Total fundraising expenses (Part IX, column (D), line 25) ▶1,032,824 | | |
| | 17 | Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e) | 1,543,157 | 1,984,492 |
| | 18 | Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25) | 4,244,199 | 5,338,305 |
| | 19 | Revenue less expenses Subtract line 18 from line 12 | 205,902 | -289,045 |
| | | | | |
| Net Assets or Fund Balances | | | Beginning of Current Year | End of Year |
| | 20 | Total assets (Part X, line 16) | 5,652,989 | 5,456,007 |
| | 21 | Total liabilities (Part X, line 26) | 123,884 | 205,557 |
| | 22 | Net assets or fund balances Subtract line 21 from line 20 | 5,529,105 | 5,250,450 |
| | | | | |

Part II

Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

| | | |
|-------------------------------|---|--|
| Sign Here | <div>*****</div> <div>Signature of officer</div> | |
| | <div>MS DARCY OLSEN PRESIDENT</div> <div>Type or print name and title</div> | |
| Paid Preparer Use Only | Print/Type preparer's name AMY A O'LOUGHLIN | Preparer's signature AMY A O'LOUGHLIN |
| | Firm's name ▶ CBIZ MHM LLC | |
| | Firm's address ▶ 3101 N CENTRAL AVE STE 300 PHOENIX, AZ 85012 | |

May the IRS discuss this return with the preparer shown above? (see instructions)

For Paperwork Reduction Act Notice, see the separate instructions.

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

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1

Briefly describe the organization’s mission

THROUGH RESEARCH, INVESTIGATIONS, STRATEGIC LITIGATION, TESTIMONY, AND EDUCATION, THE GOLDWATER INSTITUTE ADVANCES PUBLIC POLICY AND A RULE OF LAW UNDER WHICH INDIVIDUALS CAN SHAPE THEIR OWN DESTINIES AS FREE MEN AND WOMEN WE HELP CITIZENS UNDERSTAND AND ADOPT POLICIES THAT SUSTAIN AND RESTORE ECONOMIC LIBERTY, EDUCATIONAL FREEDOM, PERSONAL RESPONSIBILITY AND CONSTITUTIONAL LIMITS ON GOVERNMENT POWER CONSISTENT WITH THE FOUNDING PRINCIPLES OF OUR CONSTITUTIONAL REPUBLIC WHEN GOVERNMENT OVERSTEPS ITS PROPER BOUNDS, THE GOLDWATER INSTITUTE USES PUBLIC INTEREST LITIGATION TO ENFORCE INDIVIDUAL RIGHTS AND CONSTRAINTS ON GOVERNMENT POWER GUARANTEED BY OUR STATE AND FEDERAL CONSTITUTIONS

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

3

Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

4

Describe the organization’s program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code) (Expenses \$ 2,314,614 including grants of \$) (Revenue \$)

POLICY ANALYSIS, RESEARCH AND EDUCATION CONDUCT SCHOLARLY RESEARCH AND ANALYSIS OF STATE-LEVEL PUBLIC POLICY ISSUES AND COMMUNICATE THE RESULTS OF THAT RESEARCH TO THE PUBLIC IN AREAS THAT INCLUDE ECONOMICS, EDUCATION, HEALTH CARE, AND CONSTITUTIONAL LAW OUR PUBLIC EDUCATION OUTREACH WORK INCLUDED PUBLIC PRESENTATIONS AND 15 SPECIAL EVENTS FEATURING GOLDWATER POLICY ANALYSTS AND POLICY FIGURES THE GOLDWATER INSTITUTE ALSO CONDUCTED NUMEROUS BRIEFINGS, LED NATIONAL TASK FORCE MEETINGS, AND PROVIDED EXPERT TESTIMONY TO LEGISLATORS, STAFF, AND OFFICIALS ON A WIDE RANGE OF ISSUES IN 2014, STATE LEGISLATURES IMPLEMENTED 32 REFORMS THAT WERE INSPIRED BY GOLDWATER INSTITUTE RESEARCH AND REFORM BLUEPRINTS THESE INCLUDE PASSING THE RIGHT TO TRY ACT IN ARIZONA AND 4 OTHER STATES, WHICH ALLOWS TERMINALLY ILL PATIENTS TO TRY POTENTIALLY LIFESAVING MEDICINES THAT HAVE PASSED BASIC SAFETY TESTING BUT ARE NOT FULLY FDA APPROVED, ALLOWING PARENTS TO CUSTOMIZE THEIR CHILDREN'S EDUCATION BY IMPLEMENTING EDUCATION SAVINGS ACCOUNTS IN FLORIDA AND EXPANDING THE STUDENTS ELIGIBLE FOR EDUCATION SAVINGS ACCOUNTS IN ARIZONA, AND AMENDING THE ARIZONA CONSTITUTION TO STOP STATE AND LOCAL GOVERNMENTS FROM SPENDING TAX DOLLARS TO ENFORCE OR SUPPORT UNCONSTITUTIONAL FEDERAL ACTIVITIES OUR RESEARCH AND INFORMATION ALSO INFORMED LEGISLATIVE CONVERSATIONS, BILL DRAFTS, BILL DEFEATS, AND PUBLIC INTEREST LAWSUITS ACROSS THE COUNTRY WE MAINTAINED OUR DYNAMIC RONALD REAGAN FELLOWS PROGRAM, WHICH DEVELOPS YOUNG TALENT BY TEACHING AND EMPLOYING APPROXIMATELY 20 INTERNS AND 11 LAW CLERKS

4b

(Code) (Expenses \$ 1,390,778 including grants of \$) (Revenue \$ 72,899)

PUBLIC INTEREST LITIGATION THE GOLDWATER INSTITUTE LITIGATES CONSTITUTIONAL ISSUES OF CONCERN TO THE PUBLIC, PARTICULARLY UNDER THE STATE CONSTITUTIONS, ON BEHALF OF CLIENTS WHO WOULD NOT BE IN A POSITION TO LITIGATE AGAINST THE HEAVY HAND OF GOVERNMENT WITHOUT ASSISTANCE OR EXPERTISE WE DEFEND INDIVIDUAL, TAXPAYER, AND PROPERTY RIGHTS, FREE SPEECH AND FREE ENTERPRISE, EDUCATIONAL CHOICE, AND CONSTITUTIONAL LIMITS OUR CASES SEEK TO SET BROAD LEGAL PRECEDENTS TO PROTECT THE FREEDOMS OF OUR CLIENTS AND ALL AMERICANS THE GOLDWATER INSTITUTE'S 2014 WIN RATE IN COURT WAS 86%, WHICH EXCEEDS THE INDUSTRY STANDARD WE HAD A 100% WIN RATE FOR ALL NEW CASES FILED IN 2014 THE INSTITUTE ALSO SPEARHEADED A SUCCESSFUL "LITIGATION BY LETTERHEAD" EFFORT, WHERE WE INDUCED COUNTY GOVERNMENT TO CEASE UNLAWFUL ACTIONS BY PROVIDING THEM WITH INFORMATION BY LETTER, WITHOUT HAVING TO GO TO COURT FINALLY, WE CONTINUED TO ADVANCE CUTTING-EDGE LEGAL SCHOLARSHIP IN THE COURTS, CONTRIBUTING TO AN AMICUS BRIEF IN DEFENSE OF TAXPAYERS AND CONSTITUTIONAL LIMITS ON GOVERNMENT POWER THE INSTITUTE'S ONGOING CASELOAD AVERAGES APPROXIMATELY 17 CASES [SEE BELOW FOR CASE UPDATE]

4c

(Code) (Expenses \$ 191,850 including grants of \$) (Revenue \$ 57,375)

A RECORD YEAR IN MEDIA, PUBLICATIONS IN 2014, THE GOLDWATER INSTITUTE RAISED THE STANDARD FOR EDUCATING THE PUBLIC ABOUT SOUND GOVERNMENT POLICIES TO DEFEND AND STRENGTHEN THE FREEDOMS GUARANTEED TO ALL AMERICANS BY THE FEDERAL AND 50 STATE CONSTITUTIONS EXCEEDING THE GOLDWATER INSTITUTE'S RECORD FOR GETTING THE WORD OUT IN ANY GIVEN YEAR SINCE ITS FOUNDING IN 1988, THE INSTITUTE GARNERED AN UNPRECEDENTED AMOUNT OF MEDIA ATTENTION IN 2014 INSTITUTE LEGAL AND POLICY EXPERTS APPEARED ON MORE THAN 461 NATIONAL AND MAJOR MARKET RADIO BROADCASTS AND SHARED THEIR KNOWLEDGE ON NATIONAL TELEVISION AT LEAST 56 TIMES THE GOLDWATER INSTITUTE GAINED MAJOR COVERAGE IN PRINT AND ELECTRONIC MEDIA FROM COAST TO COAST, WITH 76 PLACEMENTS IN AMERICA'S TOP 10 NATIONALLY CIRCULATED NEWSPAPERS THE INSTITUTE'S PRESENCE IN PROMINENT NATIONAL MAGAZINES, REACHING AUDIENCES BOTH ONLINE AND OFF, ALSO SOARED, WITH MORE THAN 357 ARTICLES APPEARING IN THESE ELECTRONIC AND PRINT PUBLICATIONS NO LESS IMPRESSIVE WAS THE INSTITUTE'S PUBLICATION AND DISTRIBUTION OF ORIGINAL RESEARCH AND ANALYSIS DURING 2014, THE INSTITUTE RELEASED FIVE POLICY RESEARCH REPORTS, TWO CUTTING-EDGE LIBERTY IN ACTION NATIONAL PUBLICATIONS, THE INSTITUTE'S ANNUAL REPORT, AND ITS INFORMATIVE ELECTRONIC NEWSLETTER

4d

Other program services (Describe in Schedule O)

(Expenses \$ including grants of \$) (Revenue \$)

4e






















Total program service expenses

3,897,242

Form 990 (2014)

Part IV

Checklist of Required Schedules

| | Yes | No |
|---|---------|----|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A  | 1 Yes | |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?  | 2 Yes | |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I  | 3 | No |
| 4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II  | 4 Yes | |
| 5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III  | 5 | No |
| 6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I  | 6 | No |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II  | 7 | No |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III  | 8 | No |
| 9 Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV  | 9 | No |
| 10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V  | 10 Yes | |
| 11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable | | |
| a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI  | 11a Yes | |
| b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII  | 11b | No |
| c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII  | 11c | No |
| d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX  | 11d | No |
| e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X  | 11e | No |
| f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X  | 11f Yes | |
| 12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII  | 12a | No |
| b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional  | 12b Yes | |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | No |
| 14a Did the organization maintain an office, employees, or agents outside of the United States? | 14a | No |
| b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV | 14b | No |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV | 15 | No |
| 16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV | 16 | No |
| 17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)  | 17 Yes | |
| 18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II  | 18 Yes | |
| 19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III  | 19 | No |
| 20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H | 20a | No |
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | 20b | |

Part IV

Checklist of Required Schedules (continued)

| | | | | |
|-----|--|-----|-----|----|
| 21 | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II . . .</i> | 21 | | No |
| 22 | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III . . .</i> | 22 | | No |
| 23 | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J . . .</i> | 23 | Yes | |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . .</i> | 24a | | No |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . | 24b | | |
| c | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . | 24c | | |
| d | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . | 24d | | |
| 25a | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I . . .</i> | 25a | | No |
| b | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I . . .</i> | 25b | | No |
| 26 | Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II . . .</i> | 26 | Yes | |
| 27 | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III . . .</i> | 27 | | No |
| 28 | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions) | | | |
| a | A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . .</i> | 28a | | No |
| b | A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV . . .</i> | 28b | | No |
| c | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV . . .</i> | 28c | | No |
| 29 | Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M . . .</i> | 29 | Yes | |
| 30 | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M . . .</i> | 30 | | No |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I . . .</i> | 31 | | No |
| 32 | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II . . .</i> | 32 | | No |
| 33 | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I . . .</i> | 33 | Yes | |
| 34 | Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . .</i> | 34 | | No |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a | | No |
| b | If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2 . . .</i> | 35b | | |
| 36 | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2 . . .</i> | 36 | | No |
| 37 | Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI . . .</i> | 37 | | No |
| 38 | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O . . . | 38 | Yes | |

Part V

Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

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| | | | |
|---|--|-----|-----|
| | | Yes | No |
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. | 25 | |
| 1b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. | 0 | |
| c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | | 1c | Yes |
| 2a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. | 60 | |
| b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions). | | 2b | Yes |
| 3a Did the organization have unrelated business gross income of \$1,000 or more during the year? | | 3a | No |
| b If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation in Schedule O.</i> | | 3b | |
| 4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | | 4a | No |
| b If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). | | | |
| 5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | 5a | No |
| b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | 5b | No |
| c If "Yes," to line 5a or 5b, did the organization file Form 8886-T? | | 5c | |
| 6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? | | 6a | No |
| b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | 6b | |
| 7 Organizations that may receive deductible contributions under section 170(c). | | | |
| a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? | | 7a | Yes |
| b If "Yes," did the organization notify the donor of the value of the goods or services provided? | | 7b | Yes |
| c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | 7c | No |
| d If "Yes," indicate the number of Forms 8282 filed during the year. | | 7d | |
| e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | | 7e | No |
| f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | 7f | No |
| g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | | 7g | |
| h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | | 7h | |
| 8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? | | 8 | |
| 9a Did the sponsoring organization make any taxable distributions under section 4966? | | 9a | |
| b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | 9b | |
| 10 Section 501(c)(7) organizations. Enter | | | |
| a Initiation fees and capital contributions included on Part VIII, line 12. | | 10a | |
| b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. | | 10b | |
| 11 Section 501(c)(12) organizations. Enter | | | |
| a Gross income from members or shareholders. | | 11a | |
| b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them). | | 11b | |
| 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | | 12a | |
| b If "Yes," enter the amount of tax-exempt interest received or accrued during the year. | | 12b | |
| 13 Section 501(c)(29) qualified nonprofit health insurance issuers. | | | |
| a Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O. | | 13a | |
| b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. | | 13b | |
| c Enter the amount of reserves on hand. | | 13c | |
| 14a Did the organization receive any payments for indoor tanning services during the tax year? | | 14a | No |
| b If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation in Schedule O.</i> | | 14b | |

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

| | | | |
|--|---|-----|-----|
| | | Yes | No |
| 1a | Enter the number of voting members of the governing body at the end of the tax year | 14 | |
| If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O | | | |
| b | Enter the number of voting members included in line 1a, above, who are independent | 13 | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? | 2 | No |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | 3 | No |
| 4 | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? | 4 | No |
| 5 | Did the organization become aware during the year of a significant diversion of the organization's assets? | 5 | No |
| 6 | Did the organization have members or stockholders? | 6 | Yes |
| 7a | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? | 7a | Yes |
| b | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? | 7b | No |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following | | |
| a | The governing body? | 8a | Yes |
| b | Each committee with authority to act on behalf of the governing body? | 8b | Yes |
| 9 | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O | 9 | No |

Section B. Policies

(This Section B requests information about policies not required by the Internal Revenue Code.)

| | | | |
|--|--|-----|-----|
| | | Yes | No |
| 10a | Did the organization have local chapters, branches, or affiliates? | 10a | Yes |
| b | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? | 10b | Yes |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | 11a | Yes |
| b | Describe in Schedule O the process, if any, used by the organization to review this Form 990 | | |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13 | 12a | Yes |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | Yes |
| c | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done | 12c | Yes |
| 13 | Did the organization have a written whistleblower policy? | 13 | Yes |
| 14 | Did the organization have a written document retention and destruction policy? | 14 | Yes |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | |
| a | The organization's CEO, Executive Director, or top management official | 15a | Yes |
| b | Other officers or key employees of the organization | 15b | Yes |
| If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions) | | | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | 16a | No |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | 16b | |

Section C. Disclosure

| | | |
|----|--|--|
| 17 | List the States with which a copy of this Form 990 is required to be filed | AL, AZ, AR, CA, CO, FL, HI, IL, KY, ME, MI, MS, NJ, NY, OR, PA, RI, SC, VA, WV, WI, AK, GA, KS, MD, MA, NH, OH, OK, UT, CT, MN, NM, ND, TN |
| 18 | Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. <input type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request <input type="checkbox"/> Other (explain in Schedule O) | |
| 19 | Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year | |
| 20 | State the name, address, and telephone number of the person who possesses the organization's books and records | ROGER ZETAH |

Part VII

Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid

List all of the organization's **current** key employees, if any See instructions for definition of "key employee "

List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations

List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations

List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

| (A) Name and Title | (B) Average hours per week (list any hours for related organizations below dotted line) | (C) Position (do not check more than one box, unless person is both an officer and a director/trustee) | | | | | | (D) Reportable compensation from the organization (W- 2/1099-MISC) | (E) Reportable compensation from related organizations (W- 2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|--|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
| | | Individual trustee or director | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| (1) DARCY OLSEN PRESIDENT/CEO | 45 00 | X | | X | | | | 324,633 | 0 | 7,430 |
| (2) PAUL CLIFTON SECRETARY | 0 50 | X | | X | | | | 0 | 0 | 0 |
| (3) ERIC CROWN VICE CHAIRMAN | 5 00 | X | | X | | | | 0 | 0 | 0 |
| (4) JOHN W DAWSON DIRECTOR | 0 50 | X | | | | | | 0 | 0 | 0 |
| (5) RENEE GILTNER TREASURER | 5 00 | X | | X | | | | 0 | 0 | 0 |
| (6) BARRY GOLDWATER JR DIRECTOR | 4 00 | X | | | | | | 0 | 0 | 0 |
| (7) RANDY P KENDRICK DIRECTOR | 0 50 | X | | | | | | 0 | 0 | 0 |
| (8) NORMAN P MCCLELLAND CHAIRMAN | 3 00 | X | | X | | | | 0 | 0 | 0 |
| (9) JOHN NORTON DIRECTOR | 1 00 | X | | | | | | 0 | 0 | 0 |
| (10) THOMAS C PATTERSON CHAIRMAN | 5 00 | X | | X | | | | 0 | 0 | 0 |
| (11) MARIAN COOK DIRECTOR | 0 50 | X | | | | | | 0 | 0 | 0 |
| (12) CHRISTOPHER GLEASON DIRECTOR | 0 50 | X | | | | | | 0 | 0 | 0 |
| (13) NORMAN HARBERT DIRECTOR | 0 50 | X | | | | | | 0 | 0 | 0 |
| (14) JIM CHAMBERLAIN DIRECTOR | 3 00 | X | | | | | | 0 | 0 | 0 |

Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

| (A) Name and Title | (B) Average hours per week (list any hours for related organizations below dotted line) | (C) Position (do not check more than one box, unless person is both an officer and a director/trustee) | | | | | | (D) Reportable compensation from the organization (W- 2/1099-MISC) | (E) Reportable compensation from related organizations (W- 2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|--|--|---|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
| | | Individual trustee or director | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| (15) ROGER ZETAH CFO/SECRETARY | 45 00 | | | X | | | | 88,005 | 0 | 5,990 |
| (16) CLINT BOLICK V P OF LITIGATION | 45 00 | | | | X | | | 301,255 | 0 | 9,397 |
| (17) NICHOLAS DRANIAS DIRECTOR OF POLICY DEVELOP | 50 00 | | | | | X | | 196,792 | 0 | 6,492 |
| (18) KURT ALTMAN NAT'L POLICY DIR GEN COUNSEL | 45 00 | | | | | X | | 160,708 | 0 | 8,455 |
| (19) VICTOR RICHES V P OF EXTERNAL AFFAIRS | 45 00 | | | | | X | | 186,287 | 0 | 3,212 |
| (20) BYRON SCHLOMACH DIRECTOR OF ECONOMIC PROSPERITY | 40 00 | | | | | X | | 102,091 | 0 | 5,925 |

| | | | | | |
|----|---|---|-----------|---|--------|
| 1b | Sub-Total | ▶ | | | |
| c | Total from continuation sheets to Part VII, Section A | ▶ | | | |
| d | Total (add lines 1b and 1c) | ▶ | 1,359,771 | 0 | 46,901 |

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization▶6

| | | Yes | No |
|---|---|-----|-----|
| 3 | Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> | 3 | No |
| 4 | For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> | 4 | Yes |
| 5 | Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> | 5 | No |

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

| (A) Name and business address | (B) Description of services | (C) Compensation |
|---|--------------------------------|---------------------|
| YESCALIS CAMPAIGN STRATEGIES 513 W CAMPBELL AVE PHOENIX, AZ 85013 | ADVISORY | 116,790 |
| | | |
| | | |
| | | |
| | | |

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶1

Part VIII

Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

| | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512-514 |
|---|-----|---|----------------------|--|---|---|
| Contributions, Gifts, Grants and Other Similar Amounts | 1a | Federated campaigns 1a | | | | |
| | b | Membership dues 1b | | | | |
| | c | Fundraising events 1c | 270,258 | | | |
| | d | Related organizations 1d | | | | |
| | e | Government grants (contributions) 1e | | | | |
| | f | All other contributions, gifts, grants, and similar amounts not included above 1f | 4,469,332 | | | |
| | g | Noncash contributions included in lines 1a-1f \$ | 345,292 | | | |
| | h | Total. Add lines 1a-1f | 4,739,590 | | | |
| Program Service Revenue | 2a | LITIGATION COST REIMB | | | | |
| | | Business Code | | | | |
| | | 900099 | 72,899 | 72,899 | | |
| | b | PUBLIC POLICY EVENTS | 57,375 | 57,375 | | |
| | c | | | | | |
| | d | | | | | |
| | e | | | | | |
| | f | All other program service revenue | | | | |
| | g | Total. Add lines 2a-2f | 130,274 | | | |
| Other Revenue | 3 | Investment income (including dividends, interest, and other similar amounts) | 83,838 | | | 83,838 |
| | 4 | Income from investment of tax-exempt bond proceeds | | | | |
| | 5 | Royalties | | | | |
| | 6a | (i) Real | | | | |
| | | (ii) Personal | | | | |
| | | Gross rents | | | | |
| | | b Less rental expenses | | | | |
| | c | Rental income or (loss) | | | | |
| | d | Net rental income or (loss) | | | | |
| | 7a | (i) Securities | | | | |
| | | (ii) Other | | | | |
| | | Gross amount from sales of assets other than inventory | 1,252,408 | | | |
| | | b Less cost or other basis and sales expenses | 1,252,408 | 3,549 | | |
| | c | Gain or (loss) | 0 | -3,549 | | |
| | d | Net gain or (loss) | -3,549 | | | -3,549 |
| | 8a | Gross income from fundraising events (not including \$ 270,258 of contributions reported on line 1c) See Part IV, line 18 | | | | |
| | | a | 180,645 | | | |
| | b | Less direct expenses b | 94,267 | | | |
| | c | Net income or (loss) from fundraising events | 86,378 | | | 86,378 |
| | 9a | Gross income from gaming activities See Part IV, line 19 | | | | |
| | | a | | | | |
| | b | Less direct expenses b | | | | |
| | c | Net income or (loss) from gaming activities | | | | |
| | 10a | Gross sales of inventory, less returns and allowances | | | | |
| | | a | | | | |
| | b | Less cost of goods sold b | | | | |
| | c | Net income or (loss) from sales of inventory | | | | |
| | | Miscellaneous Revenue | Business Code | | | |
| | 11a | OTHER INCOME | 900099 | 12,729 | | 12,729 |
| | b | | | | | |
| | c | | | | | |
| | d | All other revenue | | | | |
| | e | Total. Add lines 11a-11d | 12,729 | | | |
| | 12 | Total revenue. See Instructions | 5,049,260 | 130,274 | 0 | 179,396 |

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns All other organizations must complete column (A)

Check if Schedule O contains a response or note to any line in this Part IX

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. | | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
|--|---|-----------------------|---------------------------------|--|-----------------------------|
| 1 | Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21 | | | | |
| 2 | Grants and other assistance to domestic individuals See Part IV, line 22 | | | | |
| 3 | Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16 | | | | |
| 4 | Benefits paid to or for members | | | | |
| 5 | Compensation of current officers, directors, trustees, and key employees | 736,710 | 565,793 | 61,588 | 109,329 |
| 6 | Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| 7 | Other salaries and wages | 2,074,279 | 1,592,904 | 175,487 | 305,888 |
| 8 | Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | 9,253 | 9,253 | | |
| 9 | Other employee benefits | 196,652 | 143,643 | 23,449 | 29,560 |
| 10 | Payroll taxes | 164,029 | 125,966 | 13,834 | 24,229 |
| 11 | Fees for services (non-employees) | | | | |
| a | Management | | | | |
| b | Legal | 62,432 | 30,232 | 32,200 | |
| c | Accounting | 28,661 | | 28,661 | |
| d | Lobbying | 134,447 | 134,447 | | |
| e | Professional fundraising services See Part IV, line 17 | 172,890 | | | 172,890 |
| f | Investment management fees | 55 | | 55 | |
| g | Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) | 150,881 | 140,009 | 6,468 | 4,404 |
| 12 | Advertising and promotion | 236,834 | 209,122 | | 27,712 |
| 13 | Office expenses | 461,835 | 374,127 | 16,906 | 70,802 |
| 14 | Information technology | 65,775 | 55,286 | 3,205 | 7,284 |
| 15 | Royalties | | | | |
| 16 | Occupancy | 121,761 | 88,720 | 10,096 | 22,945 |
| 17 | Travel | 161,081 | 111,653 | 10,864 | 38,564 |
| 18 | Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 | Conferences, conventions, and meetings | 9,517 | 8,712 | 705 | 100 |
| 20 | Interest | 2,630 | | 2,630 | |
| 21 | Payments to affiliates | | | | |
| 22 | Depreciation, depletion, and amortization | 139,316 | 101,481 | 11,587 | 26,248 |
| 23 | Insurance | 37,137 | 29,709 | 3,714 | 3,714 |
| 24 | Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O) | | | | |
| a | FUNDRAISING EVENTS | 144,383 | 0 | 0 | 144,383 |
| b | PRINTING | 86,745 | 86,745 | 0 | 0 |
| c | DUES AND SUBSCRIPTIONS | 64,991 | 57,853 | 698 | 6,440 |
| d | BANK/CREDIT CARD FEES | 33,044 | 0 | 3,977 | 29,067 |
| e | All other expenses | 42,967 | 31,587 | 2,115 | 9,265 |
| 25 | Total functional expenses. Add lines 1 through 24e | 5,338,305 | 3,897,242 | 408,239 | 1,032,824 |
| 26 | Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) | | | | |

Part X

Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

| | | | | | (A) Beginning of year | | (B) End of year |
|-----------------------------|---|--|-----|-----------|--------------------------|-----|--------------------|
| Assets | 1 | Cash—non-interest-bearing | | | 754,654 | 1 | 481,294 |
| | 2 | Savings and temporary cash investments | | | 15,985 | 2 | 1,426 |
| | 3 | Pledges and grants receivable, net | | | 217,159 | 3 | 20,845 |
| | 4 | Accounts receivable, net | | | 5,525 | 4 | 3,761 |
| | 5 | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L. | | | 1,950,000 | 5 | 1,550,000 |
| | 6 | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L. | | | | 6 | |
| | 7 | Notes and loans receivable, net | | | | 7 | |
| | 8 | Inventories for sale or use | | | | 8 | |
| | 9 | Prepaid expenses and deferred charges | | | 33,752 | 9 | 121,280 |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D. | 10a | 3,370,313 | | | |
| | b | Less: accumulated depreciation | 10b | 1,492,110 | 1,722,713 | 10c | 1,878,203 |
| | 11 | Investments—publicly traded securities | | | 953,201 | 11 | 1,250,026 |
| | 12 | Investments—other securities. See Part IV, line 11. | | | | 12 | 149,172 |
| | 13 | Investments—program-related. See Part IV, line 11. | | | | 13 | |
| | 14 | Intangible assets | | | | 14 | |
| | 15 | Other assets. See Part IV, line 11. | | | | 15 | |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 34). | | | 5,652,989 | 16 | 5,456,007 |
| Liabilities | 17 | Accounts payable and accrued expenses | | | 118,649 | 17 | 184,356 |
| | 18 | Grants payable | | | | 18 | |
| | 19 | Deferred revenue | | | | 19 | |
| | 20 | Tax-exempt bond liabilities | | | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D. | | | | 21 | |
| | 22 | Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L. | | | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | | 5,235 | 23 | 21,201 |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | | | 24 | |
| | 25 | Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D. | | | | 25 | |
| | 26 | Total liabilities. Add lines 17 through 25. | | | 123,884 | 26 | 205,557 |
| Net Assets or Fund Balances | Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34. | | | | | | |
| | 27 | Unrestricted net assets | | | 3,440,613 | 27 | 3,253,691 |
| | 28 | Temporarily restricted net assets | | | 1,224,137 | 28 | 1,132,404 |
| | 29 | Permanently restricted net assets | | | 864,355 | 29 | 864,355 |
| | Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34. | | | | | | |
| | 30 | Capital stock or trust principal, or current funds | | | | 30 | |
| | 31 | Paid-in or capital surplus, or land, building or equipment fund | | | | 31 | |
| | 32 | Retained earnings, endowment, accumulated income, or other funds | | | | 32 | |
| | 33 | Total net assets or fund balances | | | 5,529,105 | 33 | 5,250,450 |
| | 34 | Total liabilities and net assets/fund balances | | | 5,652,989 | 34 | 5,456,007 |

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

| | | | |
|----|---|----|-----------|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 5,049,260 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 5,338,305 |
| 3 | Revenue less expenses Subtract line 2 from line 1 | 3 | -289,045 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | 5,529,105 |
| 5 | Net unrealized gains (losses) on investments | 5 | 10,390 |
| 6 | Donated services and use of facilities | 6 | |
| 7 | Investment expenses | 7 | |
| 8 | Prior period adjustments | 8 | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | 0 |
| 10 | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | 10 | 5,250,450 |

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

| | | Yes | No |
|----|--|-----|----|
| 1 | Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis | | No |
| 2b | Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis | Yes | |
| 2c | If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O | Yes | |
| 3a | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? | | No |
| 3b | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits | | |

SCHEDULE A
(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support
Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047
2014
Open to Public Inspection

| | |
|--|--|
| Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | Employer identification number 86-0597661 |
|--|--|

Part I

Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state _____

5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II)

8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

10

☐

An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**

11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g

a

☐

Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**

b

☐

Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**

c

☐

Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**

d

☐

Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**

e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization

f

Enter the number of supported organizations _____

g


Provide the following information about the supported organization(s)






| (i)Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1- 9 above or IRC section (see instructions)) | (iv) Is the organization listed in your governing document? | | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|-----------------------------------|----------|--|---|----|---|---|
| | | | Yes | No | | |
| | | | | | | |
| | | | | | | |
| Total | | | | | | |

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Section A. Public Support | | | | | | |
|---|-----------|-----------|-----------|-----------|-----------|------------|
| Calendar year (or fiscal year beginning in) ▶ | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ") | 3,117,362 | 2,679,324 | 3,753,262 | 4,196,797 | 4,739,590 | 18,486,335 |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 4 Total. Add lines 1 through 3 | 3,117,362 | 2,679,324 | 3,753,262 | 4,196,797 | 4,739,590 | 18,486,335 |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) | | | | | | 2,073,991 |
| 6 Public support. Subtract line 5 from line 4 | | | | | | 16,412,344 |

| Section B. Total Support | | | | | | | |
|---|---|-----------|-----------|-----------|-----------|-----------|------------|
| Calendar year (or fiscal year beginning in) ▶ | | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| 7 | Amounts from line 4 | 3,117,362 | 2,679,324 | 3,753,262 | 4,196,797 | 4,739,590 | 18,486,335 |
| 8 | Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 52,982 | 51,981 | 70,525 | 80,755 | 83,838 | 340,081 |
| 9 | Net income from unrelated business activities, whether or not the business is regularly carried on | | | | | | |
| 10 | Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI) | 717 | 3,169 | 7,168 | 7,339 | 12,729 | 31,122 |
| 11 | Total support Add lines 7 through 10 | | | | | | 18,857,538 |
| 12 | Gross receipts from related activities, etc (see instructions) | | | | | 12 | 2,475,430 |
| 13 | First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here  | | | | | | |

| Section C. Computation of Public Support Percentage | | | |
|---|---|----|----------|
| 14 | Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f)) | 14 | 87 030 % |
| 15 | Public support percentage for 2013 Schedule A, Part II, line 14 | 15 | 81 090 % |
| 16a | 33 1/3% support test—2014. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization  | | |
| b | 33 1/3% support test—2013. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization  | | |
| 17a | 10%-facts-and-circumstances test—2014. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization  | | |
| b | 10%-facts-and-circumstances test—2013. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization  | | |
| 18 | Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions  | | |

Part IIISupport Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Section A. Public Support | | | | | | |
|--|----------|----------|----------|----------|----------|-----------|
| Calendar year (or fiscal year beginning in) ▶ | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.") | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513 | | | | | | |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 6 Total. Add lines 1 through 5 | | | | | | |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons | | | | | | |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year | | | | | | |
| c Add lines 7a and 7b | | | | | | |
| 8 Public support (Subtract line 7c from line 6) | | | | | | |

| Section B. Total Support | | | | | | |
|--|----------|----------|----------|----------|----------|-----------|
| Calendar year (or fiscal year beginning in) ▶ | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| 9 Amounts from line 6 | | | | | | |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | | | |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| c Add lines 10a and 10b | | | | | | |
| 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on | | | | | | |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) | | | | | | |
| 13 Total support. (Add lines 9, 10c, 11, and 12.) | | | | | | |
| 14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ | | | | | | |

| Section C. Computation of Public Support Percentage | | | |
|---|----|--|--|
| 15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f)) | 15 | | |
| 16 Public support percentage from 2013 Schedule A, Part III, line 15 | 16 | | |

| Section D. Computation of Investment Income Percentage | | | |
|--|----|--|--|
| 17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f)) | 17 | | |
| 18 Investment income percentage from 2013 Schedule A, Part III, line 17 | 18 | | |
| 19a 33 1/3% support tests—2014. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ▶ | | | |
| b 33 1/3% support tests—2013. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ▶ | | | |
| 20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ | | | |

Part IV Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

| | Yes | No |
|--|-----|----|
| 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain. | 1 | |
| 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2). | 2 | |
| 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below. | 3a | |
| b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination. | 3b | |
| c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use. | 3c | |
| 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below. | 4a | |
| b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations. | 4b | |
| c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes. | 4c | |
| 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document). | 5a | |
| b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document? | 5b | |
| c Substitutions only. Was the substitution the result of an event beyond the organization's control? | 5c | |
| 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations, (b) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI . | 6 | |
| 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990). | 7 | |
| 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part II of Schedule L (Form 990). | 8 | |
| 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI . | 9a | |
| b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI . | 9b | |
| c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI . | 9c | |
| 10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer b below. | 10a | |
| b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings). | 10b | |
| 11 Has the organization accepted a gift or contribution from any of the following persons? | | |
| a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization? | 11a | |
| b A family member of a person described in (a) above? | 11b | |
| c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI. | 11c | |

Part IV

Supporting Organizations (continued)

Section B. Type I Supporting Organizations

| | Yes | No |
|--|-----|----|
| 1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. | | |
| 2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization. | | |

Section C. Type II Supporting Organizations

| | Yes | No |
|---|-----|----|
| 1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s). | | |

Section D. All Type III Supporting Organizations

| | Yes | No |
|---|-----|----|
| 1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? | | |
| 2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s). | | |
| 3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard. | | |

Section E. Type III Functionally-Integrated Supporting Organizations

| | | | |
|--|--|--|--|
| 1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions) | | | |
| a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below. | | | |
| b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below. | | | |
| c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions). | | | |
| 2 <u>Activities Test</u> Answer (a) and (b) below. | | | |
| a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities. | | | |
| b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement. | | | |
| 3 <u>Parent of Supported Organizations</u> Answer (a) and (b) below. | | | |
| a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI. | | | |
| b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard. | | | |

Part V – Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov 20, 1970 **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E

| Section A - Adjusted Net Income | | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------|--|----------------|-----------------------------|
| 1 | Net short-term capital gain | 1 | |
| 2 | Recoveries of prior-year distributions | 2 | |
| 3 | Other gross income (see instructions) | 3 | |
| 4 | Add lines 1 through 3 | 4 | |
| 5 | Depreciation and depletion | 5 | |
| 6 | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | 6 | |
| 7 | Other expenses (see instructions) | 7 | |
| 8 | Adjusted Net Income (subtract lines 5, 6 and 7 from line 4) | 8 | |

| Section B - Minimum Asset Amount | | (A) Prior Year | (B) Current Year (optional) |
|----------------------------------|--|----------------|-----------------------------|
| 1 | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year) | 1 | |
| a | Average monthly value of securities | 1a | |
| b | Average monthly cash balances | 1b | |
| c | Fair market value of other non-exempt-use assets | 1c | |
| d | Total (add lines 1a, 1b, and 1c) | 1d | |
| e | Discount claimed for blockage or other factors (explain in detail in Part VI) _____ | | |
| 2 | Acquisition indebtedness applicable to non-exempt use assets | 2 | |
| 3 | Subtract line 2 from line 1d | 3 | |
| 4 | Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions) | 4 | |
| 5 | Net value of non-exempt-use assets (subtract line 4 from line 3) | 5 | |
| 6 | Multiply line 5 by .035 | 6 | |
| 7 | Recoveries of prior-year distributions | 7 | |
| 8 | Minimum Asset Amount (add line 7 to line 6) | 8 | |

| Section C - Distributable Amount | | | Current Year |
|----------------------------------|--|---|--------------|
| 1 | Adjusted net income for prior year (from Section A, line 8, Column A) | 1 | |
| 2 | Enter 85% of line 1 | 2 | |
| 3 | Minimum asset amount for prior year (from Section B, line 8, Column A) | 3 | |
| 4 | Enter greater of line 2 or line 3 | 4 | |
| 5 | Income tax imposed in prior year | 5 | |
| 6 | Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) | 6 | |
| 7 | <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions) | | |

| Section D - Distributions | Current Year |
|--|--------------|
| 1 Amounts paid to supported organizations to accomplish exempt purposes | |
| 2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity | |
| 3 Administrative expenses paid to accomplish exempt purposes of supported organizations | |
| 4 Amounts paid to acquire exempt-use assets | |
| 5 Qualified set-aside amounts (prior IRS approval required) | |
| 6 Other distributions (describe in Part VI) See instructions | |
| 7 Total annual distributions. Add lines 1 through 6 | |
| 8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions | |
| 9 Distributable amount for 2014 from Section C, line 6 | |
| 10 Line 8 amount divided by Line 9 amount | |

| Section E - Distribution Allocations (see instructions) | (i) Excess Distributions | (ii) Underdistributions Pre-2014 | (iii) Distributable Amount for 2014 |
|---|-----------------------------|--|---|
| 1 Distributable amount for 2014 from Section C, line 6 | | | |
| 2 Underdistributions, if any, for years prior to 2014 (reasonable cause required--see instructions) | | | |
| 3 Excess distributions carryover, if any, to 2014 | | | |
| a From 2009. | | | |
| b From 2010. | | | |
| c From 2011. | | | |
| d From 2012. | | | |
| e From 2013. | | | |
| f Total of lines 3a through e | | | |
| g Applied to underdistributions of prior years | | | |
| h Applied to 2014 distributable amount | | | |
| i Carryover from 2009 not applied (see instructions) | | | |
| j Remainder Subtract lines 3g, 3h, and 3i from 3f | | | |
| 4 Distributions for 2014 from Section D, line 7 \$ | | | |
| a Applied to underdistributions of prior years | | | |
| b Applied to 2014 distributable amount | | | |
| c Remainder Subtract lines 4a and 4b from 4 | | | |
| 5 Remaining underdistributions for years prior to 2014, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions) | | | |
| 6 Remaining underdistributions for 2014 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions) | | | |
| 7 Excess distributions carryover to 2015. Add lines 3j and 4c | | | |
| 8 Breakdown of line 7 | | | |
| a From 2010. | | | |
| b From 2011. | | | |
| c From 2012. | | | |
| d From 2013. | | | |
| e From 2014. | | | |

Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

| Return Reference | Explanation |
|---|---|
| SCHEDULE A, PART II, LINE 10, EXPLANATION OF OTHER INCOME | OTHER INCOME - 2010 AMOUNT \$ 717 2011 AMOUNT \$ 3,169 2012 AMOUNT \$ 7,168 2013 AMOUNT \$ 7,339 2014 AMOUNT \$ 12,729 |

SCHEDULE C

(Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ **Complete if the organization is described below. ▶ Attach to Form 990 or Form 990-EZ.**

▶ **Information about Schedule C (Form 990 or 990-EZ) and its instructions is at**

www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

If the organization answered "Yes" to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered "Yes" to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes" to Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

| | |
|---|--|
| Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | Employer identification number 86-0597661 |
|---|--|

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

| | | |
|---|--|------------|
| 1 | Provide a description of the organization's direct and indirect political campaign activities in Part IV | |
| 2 | Political expenditures | ▶ \$ _____ |
| 3 | Volunteer hours | _____ |

Part I-B Complete if the organization is exempt under section 501(c)(3).

| | | |
|----|---|--|
| 1 | Enter the amount of any excise tax incurred by the organization under section 4955 | ▶ \$ _____ |
| 2 | Enter the amount of any excise tax incurred by organization managers under section 4955 | ▶ \$ _____ |
| 3 | If the organization incurred a section 4955 tax, did it file Form 4720 for this year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4a | Was a correction made? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| b | If "Yes," describe in Part IV | |

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

| | | |
|---|---|--|
| 1 | Enter the amount directly expended by the filing organization for section 527 exempt function activities | ▶ \$ _____ |
| 2 | Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities | ▶ \$ _____ |
| 3 | Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b | ▶ \$ _____ |
| 4 | Did the filing organization file Form 1120-POL for this year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5 | Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV | |

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds If none, enter -0- | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0- |
|----------|-------------|---------|---|--|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Part II-A

Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A
- Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)
- B
- Check ☐ if the filing organization checked box A and "limited control" provisions apply

| Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.) | | (a) Filing organization's totals | (b) Affiliated group totals | | | | | | | | | | | | |
|--|---|--|------------------------------------|--------------------|------------------------------|---|---|---|---|--|--|-------------------|-------------|--|--|
| 1a Total lobbying expenditures to influence public opinion (grass roots lobbying) | | 72 | | | | | | | | | | | | | |
| b Total lobbying expenditures to influence a legislative body (direct lobbying) | | 134,375 | | | | | | | | | | | | | |
| c Total lobbying expenditures (add lines 1a and 1b) | | 134,447 | | | | | | | | | | | | | |
| d Other exempt purpose expenditures | | 5,203,858 | | | | | | | | | | | | | |
| e Total exempt purpose expenditures (add lines 1c and 1d) | | 5,338,305 | | | | | | | | | | | | | |
| f Lobbying nontaxable amount Enter the amount from the following table in both columns | | 416,915 | | | | | | | | | | | | | |
| <table><tr><th>If the amount on line 1e, column (a) or (b) is:</th><th>The lobbying nontaxable amount is:</th></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></table> | | If the amount on line 1e, column (a) or (b) is: | The lobbying nontaxable amount is: | Not over \$500,000 | 20% of the amount on line 1e | Over \$500,000 but not over \$1,000,000 | \$100,000 plus 15% of the excess over \$500,000 | Over \$1,000,000 but not over \$1,500,000 | \$175,000 plus 10% of the excess over \$1,000,000 | Over \$1,500,000 but not over \$17,000,000 | \$225,000 plus 5% of the excess over \$1,500,000 | Over \$17,000,000 | \$1,000,000 | | |
| If the amount on line 1e, column (a) or (b) is: | The lobbying nontaxable amount is: | | | | | | | | | | | | | | |
| Not over \$500,000 | 20% of the amount on line 1e | | | | | | | | | | | | | | |
| Over \$500,000 but not over \$1,000,000 | \$100,000 plus 15% of the excess over \$500,000 | | | | | | | | | | | | | | |
| Over \$1,000,000 but not over \$1,500,000 | \$175,000 plus 10% of the excess over \$1,000,000 | | | | | | | | | | | | | | |
| Over \$1,500,000 but not over \$17,000,000 | \$225,000 plus 5% of the excess over \$1,500,000 | | | | | | | | | | | | | | |
| Over \$17,000,000 | \$1,000,000 | | | | | | | | | | | | | | |
| g Grassroots nontaxable amount (enter 25% of line 1f) | | 104,229 | | | | | | | | | | | | | |
| h Subtract line 1g from line 1a If zero or less, enter -0- | | 0 | | | | | | | | | | | | | |
| i Subtract line 1f from line 1c If zero or less, enter -0- | | 0 | | | | | | | | | | | | | |
| j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? | | <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | | | | | |

4-Year Averaging Period Under section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

| Lobbying Expenditures During 4-Year Averaging Period | | | | | |
|--|----------|----------|----------|----------|-----------|
| Calendar year (or fiscal year beginning in) | (a) 2011 | (b) 2012 | (c) 2013 | (d) 2014 | (e) Total |
| 2a Lobbying nontaxable amount | 338,670 | 323,198 | 362,210 | 416,915 | 1,440,993 |
| b Lobbying ceiling amount (150% of line 2a, column(e)) | | | | | 2,161,490 |
| c Total lobbying expenditures | 17,629 | 35,771 | 26,619 | 134,447 | 214,466 |
| d Grassroots nontaxable amount | 84,668 | 80,800 | 90,553 | 104,229 | 360,250 |
| e Grassroots ceiling amount (150% of line 2d, column (e)) | | | | | 540,375 |
| f Grassroots lobbying expenditures | 184 | 5,587 | 1,480 | 72 | 7,323 |

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

| For each "Yes" response to lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity. | | (a) | | (b) |
|---|--|-----|----|--------|
| | | Yes | No | Amount |
| 1 | During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of | | | |
| a | Volunteers? | | | |
| b | Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? | | | |
| c | Media advertisements? | | | |
| d | Mailings to members, legislators, or the public? | | | |
| e | Publications, or published or broadcast statements? | | | |
| f | Grants to other organizations for lobbying purposes? | | | |
| g | Direct contact with legislators, their staffs, government officials, or a legislative body? | | | |
| h | Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? | | | |
| i | Other activities? | | | |
| j | Total. Add lines 1c through 1i. | | | |
| 2a | Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? | | | |
| b | If "Yes," enter the amount of any tax incurred under section 4912. | | | |
| c | If "Yes," enter the amount of any tax incurred by organization managers under section 4912. | | | |
| d | If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? | | | |

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

| | | | |
|---|---|-----|----|
| | | Yes | No |
| 1 | Were substantially all (90% or more) dues received nondeductible by members? | 1 | |
| 2 | Did the organization make only in-house lobbying expenditures of \$2,000 or less? | 2 | |
| 3 | Did the organization agree to carry over lobbying and political expenditures from the prior year? | 3 | |

Part III-B

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

| | | | |
|---|--|----|--|
| 1 | Dues, assessments and similar amounts from members | 1 | |
| 2 | Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid). | | |
| a | Current year | 2a | |
| b | Carryover from last year | 2b | |
| c | Total | 2c | |
| 3 | Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues | 3 | |
| 4 | If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? | 4 | |
| 5 | Taxable amount of lobbying and political expenditures (see instructions) | 5 | |

Part IV

Supplemental Information

Provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, Part II-A (affiliated group list), Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

| Return Reference | Explanation |
|------------------|-------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |

[illegible]

SCHEDULE D
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

► Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
► Attach to Form 990.

Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

| | |
|---|--|
| Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | Employer identification number 86-0597661 |
|---|--|

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

| | | |
|---|---|------------------------------|
| | (a) Donor advised funds | (b) Funds and other accounts |
| 1 | Total number at end of year | |
| 2 | Aggregate value of contributions to (during year) | |
| 3 | Aggregate value of grants from (during year) | |
| 4 | Aggregate value at end of year | |
| 5 | Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div> | |
| 6 | Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div> | |

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or education) ☐ Preservation of an historically important land area
☐ Protection of natural habitat ☐ Preservation of a certified historic structure
☐ Preservation of open space

2

Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

| | |
|---|--|
| | Held at the End of the Year |
| a | Total number of conservation easements |
| b | Total acreage restricted by conservation easements |
| c | Number of conservation easements on a certified historic structure included in (a) |
| d | Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register |

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ► _____

4

Number of states where property subject to conservation easement is located ► _____

5

Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6

Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ► _____

7

Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ _____

8

Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9

In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a

If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenue included in Form 990, Part VIII, line 1

► \$ _____

(ii) Assets included in Form 990, Part X

► \$ _____

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a

Revenue included in Form 990, Part VIII, line 1

► \$ _____

b

Assets included in Form 990, Part X

► \$ _____

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3

Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other
- 4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII
- 5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No
- b

If "Yes," explain the arrangement in Part XIII and complete the following table

| | |
|----|--------|
| | Amount |
| 1c | |
| 1d | |
| 1e | |
| 1f | |
- 2a

Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?

☐ Yes

☐ No
- b

If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII

☐

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

| | (a)Current year | (b)Prior year | b (c)Two years back | (d)Three years back | (e)Four years back |
|--|-----------------|---------------|---------------------|---------------------|--------------------|
| 1a Beginning of year balance | 994,612 | 894,664 | 813,775 | 808,726 | 701,107 |
| b Contributions | | | | 1,000 | 63,025 |
| c Net investment earnings, gains, and losses | 34,848 | 99,948 | 80,889 | 4,049 | 44,594 |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | 100,000 | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | 929,460 | 994,612 | 894,664 | 813,775 | 808,726 |

- 2

Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a

Board designated or quasi-endowment

0 %
- b

Permanent endowment

93 000 %
- c

Temporarily restricted endowment

7 000 %
- The percentages in lines 2a, 2b, and 2c should equal 100%

- 3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations

3a(i)

☐ Yes

☐ No

(ii) related organizations

3a(ii)

☐ Yes

☐ No
- b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

3b

☐ Yes

☐ No

4

Describe in Part XIII the intended uses of the organization's endowment funds

Part VI

Land, Buildings, and Equipment. Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property | (a) Cost or other basis (investment) | (b)Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|--|--------------------------------------|--------------------------------|------------------------------|----------------|
| 1a Land | | 358,480 | | 358,480 |
| b Buildings | | 1,768,348 | 699,480 | 1,068,868 |
| c Leasehold improvements | | | | |
| d Equipment | | 1,034,872 | 792,630 | 242,242 |
| e Other | | 208,613 | | 208,613 |
| Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).) | | | | 1,878,203 |

Part XI

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

| | | | |
|---|--|----|-----------|
| 1 | Total revenue, gains, and other support per audited financial statements | 1 | 5,059,650 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12 | | |
| a | Net unrealized gains (losses) on investments | 2a | 10,390 |
| b | Donated services and use of facilities | 2b | |
| c | Recoveries of prior year grants | 2c | |
| d | Other (Describe in Part XIII) | 2d | |
| e | Add lines 2a through 2d | 2e | 10,390 |
| 3 | Subtract line 2e from line 1 | 3 | 5,049,260 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1 | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | |
| b | Other (Describe in Part XIII) | 4b | |
| c | Add lines 4a and 4b | 4c | 0 |
| 5 | Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12) | 5 | 5,049,260 |

Part XII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

| | | | |
|---|---|----|-----------|
| 1 | Total expenses and losses per audited financial statements | 1 | 5,338,305 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25 | | |
| a | Donated services and use of facilities | 2a | |
| b | Prior year adjustments | 2b | |
| c | Other losses | 2c | |
| d | Other (Describe in Part XIII) | 2d | |
| e | Add lines 2a through 2d | 2e | 0 |
| 3 | Subtract line 2e from line 1 | 3 | 5,338,305 |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1: | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | |
| b | Other (Describe in Part XIII) | 4b | |
| c | Add lines 4a and 4b | 4c | 0 |
| 5 | Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18) | 5 | 5,338,305 |

Part XIII

Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

| Return Reference | Explanation |
|------------------|---|
| PART V, LINE 4 | THE ENDOWMENT FUNDS ARE USED TO SUPPORT THE DOROTHY D AND JOSEPH A MOLLER CENTER FOR CONSTITUTIONAL GOVERNMENT WHICH STUDIES A VARIETY OF ISSUES INCLUDING PROPERTY RIGHTS, CAMPAIGN FINANCE REGULATION, REGULATORY BODIES, LEGISLATIVE TERMS, BALANCE OF POWER AMONG LEVELS OF GOVERNMENT, PROCESSES OF JUDICIAL APPOINTMENT AND STATE SOVEREIGNTY AND TWO FELLOWSHIPS THAT GIVE EXCEPTIONAL STUDENTS THE OPPORTUNITY TO SPEND A SEMESTER WORKING ON ECONOMIC POLICY AT THE GOLDWATER INSTITUTE AND TO BE GROOMED FOR A LEADERSHIP ROLE IN THE ONGOING CONTEST FOR FREEDOM |
| PART X, LINE 2 | THE INSTITUTE EVALUATES ITS UNCERTAIN TAX POSITIONS, IF ANY, ON A CONTINUAL BASIS THROUGH REVIEW OF ITS POLICIES AND PROCEDURES, REVIEW OF ITS REGULAR TAX FILINGS, AND DISCUSSIONS WITH OUTSIDE EXPERTS. AT DECEMBER 31, 2014 AND 2013, MANAGEMENT BELIEVES THE INSTITUTE DID NOT HAVE ANY UNCERTAIN TAX POSITIONS |
| | |
| | |
| | |
| | |
| | |

[illegible]

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding
Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ.
▶ Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization
BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number
86-0597661

Part I Fundraising Activities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1

Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a

☒

Mail solicitations

e

☒

Solicitation of non-government grants

b

☒

Internet and email solicitations

f

☐

Solicitation of government grants

c

☒

Phone solicitations

g

☒

Special fundraising events

d

☒

In-person solicitations
- 2a

Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☒ Yes ☐ No
- b

If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? | | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col (i) | (vi) Amount paid to (or retained by) organization |
|---|---------------|--|----|-----------------------------------|--|---|
| | | Yes | No | | | |
| 1 AMERICAN PHILANTHROPIC LLC 18 N CHURCH ST 2 WEST CHESTER, PA 19380 | DIRECT MAIL | | No | 230,593 | 56,100 | 174,493 |
| 2 YESCALIS CAMPAIGN STRATEGIES 513 W CAMPBELL AVE PHOENIX, AZ 85013 | ADVISORY | | No | 106,014 | 116,790 | -10,776 |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| 8 | | | | | | |
| 9 | | | | | | |
| 10 | | | | | | |
| Total ▶ | | | | 336,607 | 172,890 | 163,717 |

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing

AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY, DC

Part II Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

| | | (a) Event #1 | (b) Event #2 | (c) Other events | (d) Total events |
|-----------------|----|---|--------------|------------------|----------------------------------|
| | | ANNUAL DINNER (event type) | (event type) | (total number) | (add col (a) through col (c)) |
| Revenue | 1 | Gross receipts | 450,903 | | 450,903 |
| | 2 | Less Contributions | 270,258 | | 270,258 |
| | 3 | Gross income (line 1 minus line 2) | 180,645 | | 180,645 |
| Direct Expenses | 4 | Cash prizes | | | |
| | 5 | Noncash prizes | | | |
| | 6 | Rent/facility costs | | | |
| | 7 | Food and beverages | 94,267 | | 94,267 |
| | 8 | Entertainment | | | |
| | 9 | Other direct expenses | | | |
| | 10 | Direct expense summary Add lines 4 through 9 in column (d) ▶ | | | |
| | 11 | Net income summary Subtract line 10 from line 3, column (d) ▶ | | | |

Part III Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

| | | (a) Bingo | (b) Pull tabs/Instant bingo/progressive bingo | (c) Other gaming | (d) Total gaming (add col (a) through col (c)) |
|-----------------|---|--|---|---|--|
| | | | | | |
| Revenue | 1 | Gross revenue | | | |
| Direct Expenses | 2 | Cash prizes | | | |
| | 3 | Non-cash prizes | | | |
| | 4 | Rent/facility costs | | | |
| | 5 | Other direct expenses | | | |
| | 6 | <div>Volunteer labor</div> <div><input type="checkbox"/> Yes _____ % <input type="checkbox"/> No</div> | <div><input type="checkbox"/> Yes _____ % <input type="checkbox"/> No</div> | <div><input type="checkbox"/> Yes _____ % <input type="checkbox"/> No</div> | |
| | 7 | Direct expense summary Add lines 2 through 5 in column (d) ▶ | | | |
| | 8 | Net gaming income summary Subtract line 7 from line 1, column (d) ▶ | | | |

9 Enter the state(s) in which the organization conducts gaming activities _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain _____

11

Does the organization conduct gaming activities with nonmembers?

Yes

No

12

Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

Yes

No


13


Indicate the percentage of gaming activities conducted in

| | | | |
|---|-----------------------------|-----|---|
| a | The organization's facility | 13a | % |
| b | An outside facility | 13b | % |

14

Enter the name and address of the person who prepares the organization's gaming/special events books and records

Name 

Address 



15a

Does the organization have a contract with a third party from whom the organization receives gaming revenue?

Yes


No


b

If "Yes," enter the amount of gaming revenue received by the organization  \$ and the amount of gaming revenue retained by the third party  \$

c


If "Yes," enter name and address of the third party


Name 


Address 

16

Gaming manager information

Name 

Gaming manager compensation  \$

Description of services provided 

Director/officer

Employee

Independent contractor

17

Mandatory distributions


a

Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?

Yes

No

b

Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year  \$

Part IV

Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information (see instructions).

| Return Reference | Explanation |
|---|--|
| SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS | NAME OF FUNDRAISER AMERICAN PHILANTHROPIC, LLC ADDRESS OF FUNDRAISER 18 N CHURCH ST #2, WEST CHESTER, PA 19380 NAME OF FUNDRAISER YESCALIS CAMPAIGN STRATEGIES ADDRESS OF FUNDRAISER 513 W CAMPBELL AVE PHOENIX, AZ 85013 YESCALIS CAMPAIGN STRATEGIES PROVIDED CONSULTING SERVICES TO THE GOLDWATER INSTITUTE IN CONNECTION WITH THEIR PROFESSIONAL FUNDRAISING |

Schedule G (Form 990 or 990-EZ) 2014

Schedule J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 23.
▶ Attach to Form 990.

▶ Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization
BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number

86-0597661

| Part I | Questions Regarding Compensation | | Yes | No |
|--------|--|----|-----|----|
| 1a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. <div><div><input type="checkbox"/> First-class or charter travel</div><div><input type="checkbox"/> Housing allowance or residence for personal use</div><div><input type="checkbox"/> Travel for companions</div><div><input type="checkbox"/> Payments for business use of personal residence</div><div><input type="checkbox"/> Tax idemnification and gross-up payments</div><div><input type="checkbox"/> Health or social club dues or initiation fees</div><div><input type="checkbox"/> Discretionary spending account</div><div><input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)</div></div> | | | |
| b | If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain | 1b | | |
| 2 | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a? | 2 | | |
| 3 | Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. <div><div><input type="checkbox"/> Compensation committee</div><div><input type="checkbox"/> Written employment contract</div><div><input type="checkbox"/> Independent compensation consultant</div><div><input type="checkbox"/> Compensation survey or study</div><div><input checked="" type="checkbox"/> Form 990 of other organizations</div><div><input checked="" type="checkbox"/> Approval by the board or compensation committee</div></div> | | | |
| 4 | During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization: | | | |
| a | Receive a severance payment or change-of-control payment? | 4a | | No |
| b | Participate in, or receive payment from, a supplemental nonqualified retirement plan? | 4b | | No |
| c | Participate in, or receive payment from, an equity-based compensation arrangement? | 4c | | No |
| | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. | | | |
| | Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9. | | | |
| 5 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of: | | | |
| a | The organization? | 5a | | No |
| b | Any related organization? | 5b | | No |
| | If "Yes," to line 5a or 5b, describe in Part III. | | | |
| 6 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of: | | | |
| a | The organization? | 6a | | No |
| b | Any related organization? | 6b | | No |
| | If "Yes," to line 6a or 6b, describe in Part III. | | | |
| 7 | For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III. | 7 | | No |
| 8 | Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III. | 8 | | No |
| 9 | If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? | 9 | | |

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual

| (A) Name and Title | | (B) Breakdown of W-2 and/or 1099-MISC compensation | | | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column(B) reported as deferred in prior Form 990 |
|--|------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|--|
| | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | | | | |
| 1 DARC Y OLSEN, PRESIDENT/CEO | (i) | 324,633 | 0 | 0 | 2,612 | 4,818 | 332,063 | 0 |
| | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 CLINT BOLICK, V P OF LITIGATION | (i) | 301,255 | 0 | 0 | 2,616 | 6,781 | 310,652 | 0 |
| | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 NICHOLAS DRANIAS, DIRECTOR OF POLICY DEVELOP | (i) | 131,792 | 0 | 65,000 | 1,407 | 5,085 | 203,284 | 0 |
| | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 KURT ALTMAN, NAT'L POLICY DIR GEN COUNSEL | (i) | 160,708 | 0 | 0 | 1,674 | 6,781 | 169,163 | 0 |
| | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 VICTOR RICHES, V P OF EXTERNAL AFFAIRS | (i) | 186,287 | 0 | 0 | 0 | 3,212 | 189,499 | 0 |
| | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Part III **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

| Return Reference | Explanation |
|------------------|-------------|
|------------------|-------------|

Schedule L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

► Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.
► Attach to Form 990 or Form 990-EZ.
► Information about Schedule L (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

| | |
|---|--|
| Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | Employer identification number 86-0597661 |
|---|--|

| Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only) Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b | | | | | |
|--|--|--|---------------------------------------|-----------------------|-----------|
| 1 | (a) Name of disqualified person | (b) Relationship between disqualified person and organization | (c) Description of transaction | (d) Corrected? | |
| | | | | Yes | No |
| | | | | | |

2 Enter the amount of tax incurred by organization managers or disqualified persons during the year under section 4958 ► \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ► \$

Part II

Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

| (a) Name of interested person | (b) Relationship with organization | (c) Purpose of loan | (d) Loan to or from the organization? | | (e) Original principal amount | (f) Balance due | (g) In default? | | (h) Approved by board or committee? | | (i) Written agreement? | |
|-------------------------------|------------------------------------|---------------------|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
| | | | To | From | | | Yes | No | Yes | No | Yes | No |
| (1) SHAMROCK FARMS CO | | PART V | | X | 1,200,000 | 1,550,000 | | No | Yes | | Yes | |

| | | | | | |
|-------|------|-----------|--|--|--|
| Total | ► \$ | 1,550,000 | | | |
|-------|------|-----------|--|--|--|

| | | | | |
|--|--|---------------------------------|-------------------------------|----------------------------------|
| Part III Grants or Assistance Benefiting Interested Persons. Complete if the organization answered "Yes" on Form 990, Part IV, line 27. | | | | |
| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of assistance | (d) Type of assistance | (e) Purpose of assistance |
| | | | | |

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of organization's revenues? | |
|-------------------------------|---|---------------------------|--------------------------------|---|----|
| | | | | Yes | No |
| | | | | | |

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions)

| Return Reference | Explanation |
|--|--|
| SCHEDULE L, PART II, (C), LOANS TO AND FROM INTERESTED PERSONS | THE INSTITUTE HAS ELECTED TO INVEST ITS EXCESS CASH IN TWO PROMISSORY NOTES WITH A PRIVATELY HELD CORPORATION CONTROLLED BY A BOARD MEMBER THESE REVOLVING NOTES PROVIDE THE INSTITUTE WITH THE ABILITY TO REQUEST PAYMENTS OF THE PRINCIPAL BALANCES PRIOR TO THEIR MATURITY DATES THE INSTITUTE MAY REINVEST FUNDS INTO THE NOTES UP TO THE MAXIMUM AMOUNT PROVIDED IN THE NOTE AGREEMENTS ON JANUARY 1, 2002, THE INSTITUTE OBTAINED AN UNSECURED REVOLVING PROMISSORY NOTE FROM A PRIVATELY HELD CORPORATION CONTROLLED BY A BOARD MEMBER FOR THE SUM OF \$200,000 THE NOTE BEARS INTEREST AT 10% PER ANNUM UNTIL PAID TERMS OF THE NOTE CALL FOR INTEREST TO BE PAID TO THE INSTITUTE MONTHLY DURING 2011, THE MATURITY OF THE NOTE WAS EXTENDED TO DECEMBER 31, 2015 DURING THE YEAR ENDED DECEMBER 31, 2005, THE INSTITUTE OBTAINED ANOTHER UNSECURED REVOLVING PROMISSORY NOTE FROM THE SAME CORPORATION AS ABOVE FOR THE PURPOSE OF INVESTING THE INSTITUTE'S EXCESS CASH WITH A MAXIMUM AMOUNT OF \$1,000,000 DURING 2011, THE MAXIMUM AMOUNT WAS INCREASED TO \$1,750,000 AND THE MATURITY DATE WAS EXTENDED TO DECEMBER 31, 2015 THE NOTE BEARS INTEREST AT THE RATE CHARGED BY FARM CREDIT SERVICES SOUTHWEST (2 25% AT DECEMBER 31, 2014) THE TERMS OF THE NOTE CALL FOR INTEREST TO BE PAID TO THE INSTITUTE MONTHLY IN MARCH 2015, THIS INVESTMENT IN NOTES RECEIVABLE WAS LIQUIDATED AND \$800,000 OF THE FUNDS WERE TRANSFERRED TO OTHER INVESTMENTS |

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

►Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
► Attach to Form 990.
►Information about Schedule M (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization
BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number
86-0597661

Part I

Types of Property

| | (a) Check if applicable | (b) Number of contributions or items contributed | (c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d) Method of determining noncash contribution amounts |
|--|----------------------------------|--|---|--|
| 1 Art—Works of art | | | | |
| 2 Art—Historical treasures | | | | |
| 3 Art—Fractional interests | | | | |
| 4 Books and publications | | | | |
| 5 Clothing and household goods | | | | |
| 6 Cars and other vehicles | | | | |
| 7 Boats and planes | | | | |
| 8 Intellectual property | | | | |
| 9 Securities—Publicly traded | X | 9 | 339,013 | STOCK QUOTE |
| 10 Securities—Closely held stock | | | | |
| 11 Securities—Partnership, LLC, or trust interests | | | | |
| 12 Securities—Miscellaneous | | | | |
| 13 Qualified conservation contribution—Historic structures | | | | |
| 14 Qualified conservation contribution—Other | | | | |
| 15 Real estate—Residential | | | | |
| 16 Real estate—Commercial | | | | |
| 17 Real estate—Other | | | | |
| 18 Collectibles | | | | |
| 19 Food inventory | | | | |
| 20 Drugs and medical supplies | | | | |
| 21 Taxidermy | | | | |
| 22 Historical artifacts | | | | |
| 23 Scientific specimens | | | | |
| 24 Archeological artifacts | | | | |
| 25 Other ► (AIRFARE) | X | 1 | 5,479 | SALES PRICE |
| 26 Other ► (CENTERPIECES FOR DINNER) | X | 1 | 800 | SALES PRICE |
| 27 Other ► (_____) | | | | |
| 28 Other ► (_____) | | | | |

29

Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

0

30a

During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

30a

No

b

If "Yes," describe the arrangement in Part II

31

Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

31

Yes

32a

Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

32a

Yes

b

If "Yes," describe in Part II

33

If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

Part II

Supplemental Information.

Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

| Return Reference | Explanation |
|------------------|--|
| PART I, LINE 32B | THE INSTITUTE HELD AN AUCTION AT ITS ANNUAL DINNER THE AUCTION SERVICE AND ITEMS (COLLECTIBLES, TRIPS, ETC) WERE OUTSOURCED TO A VENDOR |

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

**Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.**

▶ Attach to Form 990 or 990-EZ.

**▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at
www.irs.gov/form990.**

OMB No 1545-0047

2014

**Open to Public
Inspection**

| | |
|---|--|
| Name of the organization BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY RESEARCH | Employer identification number 86-0597661 |
|---|--|

| Return Reference | Explanation | |
|------------------|---|--|
| | FORM 990, PART III, LINE 4B CASE UPDATE | <p>BIGGS V BREWER ON BEHALF OF 36 STATE LEGISLATORS, THE GOLDWATER INSTITUTE FILED A LAWSUIT CHALLENGING A NEW MEDICAID EXPANSION TAX, WHICH BECAME LAW WITHOUT APPROVAL OF A CONSTITUTIONALLY REQUIRED SUPERMAJORITY, NULLIFYING THE VOTES OF THOSE LEGISLATORS WHO OPPOSED IT. THE STATE TRIAL COURT DISMISSED THE LAWSUIT WITHOUT REACHING THE ISSUE OF WHETHER THE TAX WAS CONSTITUTIONAL, HOLDING THAT THE PLAINTIFFS DID NOT HAVE STANDING TO SUE. THE ARIZONA COURT OF APPEALS AND ARIZONA SUPREME COURT BOTH UNANIMOUSLY REVERSED THAT DECISION, HOLDING THAT A BARE MAJORITY OF LEGISLATORS CANNOT VOTE TO CIRCUMVENT A CONSTITUTIONAL SUPERMAJORITY REQUIREMENT AND THAT THE LEGISLATORS WHOSE VOTES WERE NULLIFIED COULD SUE. THE CASE IS NOW BEFORE THE TRIAL COURT TO DETERMINE THE ISSUE OF WHETHER THE TAX WAS CONSTITUTIONAL. NO ATTORNEY'S FEES HAVE BEEN AWARDED SO FAR (BUT THEY WERE REQUESTED IN THE COMPLAINT). BRUMFIELD V DODD THE GOLDWATER INSTITUTE MOVED TO INTERVENE ON BEHALF OF LOUISIANA FAMILIES DEFENDING THE STATE'S VOUCHER PROGRAM AGAINST THE DEPARTMENT OF JUSTICE'S LEGAL CHALLENGE BROUGHT UNDER A 40-YEAR-OLD DESEGREGATION DECREE. AFTER THE U.S. COURT OF APPEALS FOR THE FIFTH CIRCUIT SUCCESSFULLY GRANTED INTERVENTION, THE INSTITUTE MOVED FOR AN IMMEDIATE DISMISSAL OF THE DOJ'S LEGAL CHALLENGE. THE DISTRICT COURT DENIED THE MOTION, AND THE INSTITUTE APPEALED THAT DENIAL BACK TO THE FIFTH CIRCUIT, ARGUING THAT THE DISTRICT COURT'S ORDER GRANTING JURISDICTION OVER THE PROGRAM SHOULD BE DISMISSED IN ITS ENTIRETY. WE ARE AWAITING ORAL ARGUMENT IN THE FIFTH CIRCUIT COURT OF APPEALS. THE INSTITUTE DID NOT SEEK ATTORNEY'S FEES. CHEATHAM V DICICCIO ON BEHALF OF TAXPAYERS, THE GOLDWATER INSTITUTE SUED THE CITY OF PHOENIX TO ENJOIN ITS CONTRACT WITH THE PHOENIX LAW ENFORCEMENT ASSOCIATION. THE CONTRACT PERMITS SIX OFFICERS TO WORK FOR THE UNION FULL TIME WITHOUT LOSS OF PAY. IT PERMITS MANY OTHER OFFICERS TO DO SO ON A PART-TIME BASIS. THE INSTITUTE'S LAWSUIT SEEKS TO ENJOIN THIS PRACTICE ON THE THEORY THAT IT IS A GIFT TO A PRIVATE ASSOCIATION, IN VIOLATION OF THE ARIZONA CONSTITUTION'S GIFT CLAUSE. AFTER A TRIAL, THE STATE TRIAL COURT NOT ONLY ENJOINED THE UNION CONTRACT UNDER WHICH THE INSTITUTE SUED, BUT ALSO DIRECTED PHOENIX TO CORRECT ALL UNION CONTRACTS WITH SIMILAR PROVISIONS. WHILE THAT RULING IS BEING APPEALED, THE INSTITUTE ALSO ACHIEVED A TEMPORARY RESTRAINING ORDER ON A NEW PRACTICE THAT THE INSTITUTE ARGUED VIOLATES THE COURT ORDER. IN 2014, \$339,000 IN ATTORNEY'S FEES WERE AWARDED BUT ARE CONTINGENT UPON THE INSTITUTE'S PREVAILING APPEAL. THE INSTITUTE IS AWAITING A DECISION FROM THE APPELLATE COURT. COONS V LEW ON BEHALF OF AN ARIZONA TAXPAYER AND DOCTOR, THE GOLDWATER INSTITUTE FILED THIS LAWSUIT CHALLENGING THE PATIENT PROTECTION AND AFFORDABLE CARE ACT (PPACA) FOR EXCEEDING THE POWERS OF CONGRESS, VIOLATING INDIVIDUAL RIGHTS, INTERFERING WITH THE AUTHORITY OF STATES, AND VIOLATING THE SEPARATION OF POWERS DOCTRINE BY SETTING UP A NEW BUREAUCRACY WITHOUT MEANINGFUL CONGRESSIONAL OVERSIGHT OR JUDICIAL REVIEW (THE INDEPENDENT PAYMENT ADVISORY BOARD). THE FEDERAL TRIAL COURT UPHELD IPAB'S POWERS BUT THE NINTH CIRCUIT VACATED THAT DECISION, HOLDING INSTEAD THAT THE CASE IS NOT RIPE FOR REVIEW BY COURTS BECAUSE IPAB HAS NOT YET ACTED. THE INSTITUTE FILED A CERT PETITION WITH THE UNITED STATES SUPREME COURT IN LATE 2014, WHICH A FEW DOZEN CONGRESSMEN SUPPORTED WITH AN AMICUS BRIEF. THE SUPREME COURT DENIED THE CERT PETITION IN MARCH 2015. NO ATTORNEY'S FEES WERE AWARDED. ENERGY AND ENVIRONMENTAL LEGAL INSTITUTE V ARIZONA BOARD OF REGENTS ON DECEMBER 7, 2011, THE ENERGY AND ENVIRONMENTAL LEGAL INSTITUTE, A NON-PROFIT RESEARCH AND PUBLIC POLICY ORGANIZATION, REQUESTED A SERIES OF E-MAILS TO AND FROM PROFESSORS AT THE UNIVERSITY OF ARIZONA AND OTHER UNIVERSITIES REQUESTING INFORMATION PERTAINING TO CLIMATE RESEARCH. THE UNIVERSITY OF ARIZONA AND ITS PERSONNEL REFUSED TO PROVIDE SEVERAL REQUESTED RECORDS, CLAIMING THOSE RECORDS WERE EXEMPT UNDER ARIZONA'S PUBLIC RECORDS LAWS. EELI THEN FILED A SPECIAL ACTION AGAINST THE ARIZONA BOARD OF REGENTS TO COMPEL DISCLOSURE OF THE REQUESTED RECORDS. THE GOLDWATER INSTITUTE IS SERVING AS LOCAL COUNSEL IN THIS CASE. THE TRIAL COURT RECENTLY DENIED EELI'S REQUEST TO COMPEL PRODUCTION. EELI SOUGHT ATTORNEY'S FEES IN THIS ACTION. FAASSE V SCOTT IN MAY 2014, THE FLORIDA LEGISLATURE PASSED A COMPREHENSIVE EDUCATION BILL THAT INCLUDED THE PERSONAL LEARNING SCHOLARSHIP ACCOUNT (PLSA) PROGRAM. THE FLORIDA EDUCATION ASSOCIATION (FEA) SUED, CLAIMING THAT THE BILL VIOLATED THE FLORIDA CONSTITUTION'S "SINGLE SUBJECT" RULE, WHICH REQUIRES THAT EVERY BILL PASSED CONTAIN ONLY ONE SUBJECT. THE INSTITUTE INTERVENED REPRESENTING SIX SPECIAL NEEDS FAMILIES ENROLLED IN THE PROGRAM. THE FLORIDA TRIAL COURT TWICE DISMISSED THE CASE, FINDING THAT THE FEA LACKED STANDING TO CHALLENGE THE PROGRAM IN COURT. THE FEA DID NOT APPEAL THE DISMISSAL. NO ATTORNEY'S FEES WERE SOUGHT. FLYTENOW, INC V FEDERAL AVIATION</p> |

| Return Reference | Explanation |
|---|--|
| FORM 990, PART III, LINE 4B CASE UPDATE | <p>ON ADMINISTRATION THE GOLDWATER INSTITUTE FILED A LAWSUIT ON BEHALF OF FLYTENOW, INC , CHALLENGING THE FEDERAL AVIATION ADMINISTRATION'S (FAA'S) LETTER OF INTERPRETATION PROHIBITING PRIVATE PILOTS FROM SHARING PRO-RATED OPERATING EXPENSES OF FLIGHTS WITH PASSENGERS IN 2 - OR 4-SEATER AIRPLANES UNDER FAA'S EXISTING EXPENSE-SHARING RULE. THE LAWSUIT SEEKS TO VINDICATE THE FREE SPEECH RIGHTS OF PILOTS AND PASSENGERS TO COMMUNICATE USING FLYTENOW'S WEBSITE, AND CHALLENGES THE LETTER OF INTERPRETATION FOR DISCRIMINATING AGAINST FLYTENOW AND PRIVATE PILOTS AS AN EQUAL PROTECTION VIOLATION. NO ATTORNEY'S FEES HAVE BEEN AWARDED SO FAR, BUT THEY WERE REQUESTED IN THE PETITIONER'S OPENING BRIEF. HIRSHMAN V. CITY OF TUCSON SEVERAL ARIZONA CITIES HAVE CONTRACT BID PREFERENCES FOR LOCAL BUSINESSES, WHICH INFLATE THE PRICE OF SERVICES TO TAXPAYERS AND DISCRIMINATES AGAINST COMPETITORS. TUCSON'S IS ESPECIALLY EGREGIOUS. ON BEHALF OF THREE TUCSON TAXPAYERS, THE GOLDWATER INSTITUTE SUED THE CITY OF TUCSON, SEEKING TO END THE CITY'S DISCRIMINATORY BID PREFERENCE ORDINANCE THAT ALLOWS "LOCAL" SPECIAL INTERESTS TO RECEIVE SUBSIDIES ON CITY CONTRACTS. THE TRIAL COURT RULED TUCSON'S BID PREFERENCE ORDINANCE UNCONSTITUTIONAL ON ALL GROUNDS AND IN ITS ENTIRETY. THE CITY HAS DECIDED NOT TO APPEAL THIS DECISION, AND THE INSTITUTE WAS AWARDED ATTORNEY'S FEES IN THE AMOUNT OF \$21,440.93. KORWIN V. COTTON THE GOLDWATER INSTITUTE FILED A LAWSUIT ON BEHALF OF ALAN KORWIN AND HIS BUSINESS TRAINMEAZ, LLC, TO CHALLENGE THE PHOENIX PUBLIC TRANSIT DEPARTMENT'S DECISION TO REMOVE POSTERS AT 50 BUS SHELTERS ADVERTISING THE COMPANY'S WEBSITE. THE LAWSUIT SEEKS TO VINDICATE ALAN'S RIGHTS TO FREE SPEECH, DUE PROCESS, AND EQUAL PROTECTION UNDER THE ARIZONA AND UNITED STATES CONSTITUTIONS. THE INSTITUTE WAS UNSUCCESSFUL IN THE TRIAL COURT, BUT WON ITS AS-APPLIED CHALLENGE IN THE COURT OF APPEALS. THE INSTITUTE WAS AWARDED ATTORNEY'S FEES AND COSTS IN THE AMOUNT OF \$72,898.70. MCQUEEN V. DOUGLAS IN FEBRUARY 2014, BRAD MCQUEEN, A TUCSON ELEMENTARY PUBLIC SCHOOL TEACHER, SPOKE OUT AGAINST THE NEW FEDERAL COMMON CORE STANDARDS BEING IMPLEMENTED IN ARIZONA. MCQUEEN HAD PARTICIPATED IN NUMEROUS COMMON CORE COMMITTEES AND OVER TIME GREW SKEPTICAL ABOUT THE STANDARDS AND BEGAN EXPRESSING HIS CONCERNS PUBLICLY. MEMBERS OF THE ARIZONA DEPARTMENT OF EDUCATION RETALIATED AGAINST MCQUEEN BY REMOVING HIM FROM ALL TEACHER COMMITTEES, WHETHER OR NOT THE COMMITTEES RELATED TO THE NEW COMMON CORE STANDARDS. ALONG THE WAY, THEY DISPARAGED MCQUEEN INSIDE THE DEPARTMENT. THE GOLDWATER INSTITUTE IS REPRESENTING MCQUEEN IN A LAWSUIT TO END THE RETALIATION AND MAKE SURE THAT TEACHERS' FREE SPEECH RIGHTS ARE PROTECTED. THE STATE DEFENDANTS REMOVED THE CASE TO FEDERAL COURT AND DISCOVERY IS ONGOING. NO ATTORNEY'S FEES HAVE BEEN AWARDED SO FAR (BUT THEY WERE REQUESTED IN THE COMPLAINT). NIEHAUS V. HUPPENTHAL THE GOLDWATER INSTITUTE JOINED THE STATE OF ARIZONA IN DEFENDING AGAINST A LAWSUIT THAT WAS BROUGHT CHALLENGING ARIZONA'S EMPOWERMENT SCHOLARSHIP ACCOUNT PROGRAM. THIS PROGRAM ALLOWS PARENTS OF SPECIAL-NEEDS CHILDREN TO WITHDRAW THEIR CHILDREN FROM PUBLIC SCHOOLS AND USE A PORTION OF THE MONEY THAT WOULD HAVE GONE TO THE LOCAL DISTRICT TO DESIGN THEIR OWN EDUCATIONAL PLAN. THE INSTITUTE ARGUED THAT EVEN THOUGH PARENTS MAY SPEND THE MONEY ON PRIVATE AND RELIGIOUS SCHOOLING, THE GOVERNMENT IS SUFFICIENTLY INSULATED FROM THE DECISION SO AS TO NOT CONSTITUTE A GOVERNMENT EXPENDITURE FOR RELIGIOUS SCHOOLING. THE STATE (AND THE INSTITUTE) PREVAILED IN THE TRIAL COURT AND THE COURT OF APPEALS. IN 2014, THE ARIZONA SUPREME COURT REJECTED A PETITION FOR REVIEW, SO THE COURT OF APPEALS DECISION STANDS. NO ATTORNEY'S FEES WERE SOUGHT. PLEA V. DUPUY FOLLOWING THE CONTRACT CHANGES THAT ENDED PHOENIX'S PRACTICE OF PENSION SPIKING, ALLOWING RETIRING OFFICERS TO ARTIFICIALLY INFLATE THEIR RETIREMENT PAY BY CASHING IN UNUSED SICK LEAVE, VACATION TIME, AND UNIFORM ALLOWANCES, GOVERNMENT UNIONS SUED THE CITY, C</p> |

| Return Reference | Explanation |
|---------------------|--|
| (CONTINUED) | <p>SEDONA GRAND V CITY OF SEDONA THE CITY OF SEDONA, ARIZONA, MADE IT A CRIME TO RENT RESIDENTIAL PROPERTY FOR FEWER THAN 30 DAYS SEDONA DEFINED "RENT" VERY BROADLY, SUBJECTING PROPERTY OWNERS TO PUNISHMENTS OF UP TO SIX MONTHS IN JAIL AND/OR A \$2,500 FINE FOR ENGAGING IN A WIDE RANGE OF ACTIVITIES, INCLUDING PURCHASING A TIME SHARE, CONTRACTING FOR HOME IMPROVEMENTS, AND EVEN HIRING A BABYSITTER THE CITY ATTEMPTED TO CIRCUMVENT PROPOSITION 207 - A VOTER-ENACTED PROTECTION THAT REQUIRES GOVERNMENT TO COMPENSATE PROPERTY OWNERS WHEN REGULATIONS DIMINISH PROPERTY RIGHTS AND DEVALUE PROPERTY - BY MASQUERADING A PROPERTY REGULATION AS A HEALTH AND SAFETY ORDINANCE, ARGUING IT IS EXEMPT FROM THE LAW THANKS IN PART TO THE GOLDWATER INSTITUTE'S LEGAL WORK AS AMICUS, THE COURTS RULED THAT CITIES CAN'T AVOID PROP 207 BY MERELY CLAIMING TO ADVANCE PUBLIC HEALTH WITHOUT OFFERING ANY EVIDENCE THE CASE WAS SENT BACK TO THE TRIAL COURT TO DETERMINE WHETHER THE CITY'S WEAK HEALTH AND SAFETY RATIONALE PASSES MUSTER THE INSTITUTE PAIRED WITH LOCAL COUNSEL TO REPRESENT THE PROPERTY OWNERS, AND THE COURT ADOPTED THE INSTITUTE'S PROPOSED HEALTH-AND-SAFETY STANDARD, FINDING THAT SEDONA DID NOT ESTABLISH A PROPER HEALTH-AND-SAFETY NEXUS THAT WOULD ALLOW IT TO FALL WITHIN THAT EXEMPTION TO PROP 207 NO ATTORNEY'S FEES WERE AWARDED</p> <p>TOMBSTONE V UNITED STATES THE GOLDWATER INSTITUTE IS REPRESENTING THE CITY OF TOMBSTONE IN A LAWSUIT AGAINST THE U S FOREST SERVICE IN A FIGHT OVER WATER RIGHTS AND RIGHTS OF WAY TO ACCESS THOSE RIGHTS CITING THE WILDERNESS ACT, THE FOREST SERVICE IS REFUSING TO ALLOW THE CITY TO REPAIR ITS WATERLINES TO SPRINGS IT HAS OWNED FOR NEARLY SEVENTY YEARS- AND WHICH DATE BACK TO THE 1880S THIS REFUSAL IS THREATENING RESIDENTS, PRIVATE PROPERTY AND PUBLIC SAFETY WITH THE RISK OF A TOTAL LOSS OF FIRE PROTECTION BECAUSE THE SPRING WATER IS USED TO FILL RESERVES NEEDED FOR FIRE SUPPRESSION IN THE TOWN ADDITIONALLY, THE REFUSAL THREATENS PUBLIC HEALTH AND WELFARE BY POTENTIALLY FORCING RESIDENTS AND TOURISTS TO DRINK LOCAL WELL WATER THAT HAS HIGH LEVELS OF ARSENIC THE INSTITUTE WAS UNSUCCESSFUL IN SEEKING A PRELIMINARY INJUNCTION AGAINST THE FOREST SERVICE TO ALLOW TOMBSTONE EMERGENCY ACCESS TO ITS SPRINGS THE TRIAL COURT GRANTED THE FOREST SERVICE'S MOTION FOR SUMMARY JUDGMENT AND DISMISSED THE CASE, HOLDING THAT THE STATUTE OF LIMITATIONS HAD RUN ON TOMBSTONE'S CLAIMS AN APPEAL IS POSSIBLE NO ATTORNEY'S FEES HAVE BEEN AWARDED SO FAR (BUT THEY WERE REQUESTED IN THE COMPLAINT)</p> <p>VONG V AUNE THE ARIZONA BOARD OF COSMETOLOGY BANNED THE USE OF SPA FISH AS A THERAPY TO REMOVE DEAD SKIN FROM A PERSON'S FEET THE GOLDWATER INSTITUTE SUED THE BOARD ON BEHALF OF THE ONLY KNOWN SALON IN ARIZONA USING THIS THERAPY, SEEKING TO ENFORCE CONSTITUTIONAL LIMITS ON GOVERNMENT AUTHORITY AND PROTECT ENTREPRENEURIAL FREEDOM AFTER SURVIVING A MOTION TO DISMISS IN THE COURT OF APPEALS, THE TRIAL COURT RULED AGAINST THE INSTITUTE ON THE MERITS, AND THE COURT OF APPEALS AFFIRMED THE INSTITUTE FILED A CERT PETITION WITH THE UNITED STATES SUPREME COURT IN EARLY 2015 NO ATTORNEY'S FEES HAVE BEEN AWARDED SO FAR (BUT THEY WERE REQUESTED IN THE COMPLAINT)</p> <p>WRIGHT V STANTON ON BEHALF OF TAXPAYERS, THE GOLDWATER INSTITUTE SUED THE CITY OF PHOENIX TO CHALLENGE ITS ILLEGAL "PENSION SPIKING" PRACTICE, WHEREBY THE CITY ALLOWS SENIOR PUBLIC SAFETY PERSONNEL TO INCREASE THE AMOUNT OF THEIR PENSIONS BY CASHING IN UNUSED SICK LEAVE, VACATION, AND OTHER BENEFITS, THEREBY INFLATING THE FINAL SALARY USED TO CALCULATE PENSION BENEFITS THE RESULT IS HUNDREDS OF MILLION IN INCREASED COSTS TO PHOENIX TAXPAYERS THIS PRACTICE OF "PENSION SPIKING" VIOLATES A STATE STATUTE THAT PROHIBITS PUBLIC EMPLOYEES FROM USING "UNUSED SICK LEAVE, PAYMENT IN LIEU OF VACATION, PAYMENT FOR UNUSED COMPENSATORY TIME OR PAYMENT FOR ANY FRINGE BENEFITS" TO INCREASE COMPENSATION FOR PENSION PURPOSES THE INSTITUTE SURVIVED FOUR MOTIONS TO DISMISS, ALLOWING THE CASE TO PROCEED IN RESPONSE TO THIS CASE, THE CITY OF PHOENIX VOLUNTARILY CHANGED ITS CONTRACTS WITH UNION ORGANIZATIONS TO ELIMINATE THE PENSION SPIKING PROVISIONS THE INSTITUTE DOES NOT SEEK ATTORNEY'S FEES</p> |

| Return Reference | Explanation |
|--------------------------------------|---|
| FORM 990, PART VI, SECTION A, LINE 6 | THE MEMBERS OF THE BOARD OF DIRECTORS ARE ALSO MEMBERS OF THE CORPORATION |

| Return Reference | Explanation |
|---------------------------------------|---|
| FORM 990, PART VI, SECTION A, LINE 7A | NEW DIRECTORS ARE ELECTED BY THE REMAINING BOARD OF DIRECTORS |

| Return Reference | Explanation |
|---------------------------------------|--|
| FORM 990, PART VI, SECTION B, LINE 11 | AN OUTSIDE ACCOUNTING FIRM PREPARES THE FORM 990 AND IT IS REVIEWED BY THE TREASURER, CFO, AND EXECUTIVE COMMITTEE PRIOR TO SUBMISSION TO THE BOARD OF DIRECTORS FOR REVIEW THE TREASURER AND CFO ADDRESS ANY ISSUES RAISED BY THE BOARD BEFORE THE RETURN IS FILED WITH THE IRS |

| Return Reference | Explanation |
|---|---|
| FORM 990, PART VI, SECTION B, LINE 12C | IN CONNECTION WITH ANY ACTUAL OR POSSIBLE CONFLICT OF INTEREST, AN INTERESTED PERSON MUST DISCLOSE THE EXISTENCE OF THE FINANCIAL INTEREST AND BE GIVEN THE OPPORTUNITY TO DISCLOSE ALL MATERIAL FACTS TO THE DIRECTORS AND MEMBERS OF COMMITTEES WITH GOVERNING BOARD DELEGATED POWERS CONSIDERING THE PROPOSED TRANSACTION OR ARRANGEMENT ANY DIRECTOR, PRINCIPAL OFFICER, OR MEMBER OF A COMMITTEE WITH GOVERNING BOARD DELEGATED POWERS, WHO HAS A DIRECT OR INDIRECT FINANCIAL INTEREST IS AN INTERESTED PERSON AFTER DISCLOSURE OF THE FINANCIAL INTEREST AND ALL MATERIAL FACTS, AND AFTER ANY DISCUSSION WITH THE INTERESTED PERSON, HE/SHE SHALL LEAVE THE GOVERNING BOARD OR COMMITTEE MEETING WHILE THE DETERMINATION OF THE CONFLICT OF INTEREST IS DISCUSSED AND VOTED UPON THE REMAINING BOARD OR COMMITTEE MEMBERS SHALL DISCUSS IF A CONFLICT OF INTEREST EXISTS THE ORGANIZATION'S CONFLICT OF INTEREST POLICY REQUIRES ANNUAL DISCLOSURE FROM ALL MEMBERS OF THE BOARD OF DIRECTORS AND OFFICERS A STATEMENT IS FILED BY EACH BOARD MEMBER REQUIRING THE DISCLOSURE OF ANY CONFLICTS AND TO STATE THE RESOLUTION OF THAT CONFLICT, IF ANY |

| Return Reference | Explanation |
|---------------------------------------|--|
| FORM 990, PART VI, SECTION B, LINE 15 | THE ORGANIZATION LOOKS AT THE FORM 990 OF SIMILAR ORGANIZATIONS AND COMPARES COMPENSATION FOR THE CEO AND KEY EMPLOYEES THIS INFORMATION IS PRESENTED TO THE EXECUTIVE COMMITTEE ANNUALLY FOR REVIEW AND APPROVAL IN SETTING EXECUTIVE COMPENSATION ALL COMPENSATION DECISIONS ARE DOCUMENTED IN THE BOARD MINUTES |

| Return Reference | Explanation |
|--|---|
| FORM 990, PART VI, SECTION C, LINE 19 | THE FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST THE ORGANIZATION DOES NOT MAKE ITS GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY AVAILABLE TO THE PUBLIC |

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.

▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization
BARRY GOLDWATER INSTITUTE FOR
PUBLIC POLICY RESEARCH

Employer identification number

86-0597661

| Part I Identification of Disregarded Entities Complete if the organization answered "Yes" on Form 990, Part IV, line 33. | | | | | |
|--|-------------------------|--|---------------------|---------------------------|----------------------------------|
| (a) Name, address, and EIN (if applicable) of disregarded entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
| (1) GOLDWATER INSTITUTE HOLDING COMPANY LLC 500 E CORONADO RD PHOENIX, AZ 85004 86-1023067 | REAL ESTATE | AZ | 0 | 1,878,203 | N/A |

| Part II Identification of Related Tax-Exempt Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year. | | | | | | |
|---|-------------------------|--|----------------------------|---|----------------------------------|--|
| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Exempt Code section | (e) Public charity status (if section 501(c)(3)) | (f) Direct controlling entity | (g) Section 512(b)(13) controlled entity? |
| | | | | | | Yes No |
| | | | | | | |

Part III

Identification of Related Organizations Taxable as a Partnership

Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Predominant income(related, unrelated, excluded from tax under sections 512- 514) | (f) Share of total income | (g) Share of end-of-year assets | (h) Dispropportionate allocations? | | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (j) General or managing partner? | | (k) Percentage ownership |
|--|-------------------------|--|--|--|---------------------------------|--|--|----|--|---|----|--------------------------------|
| | | | | | | | Yes | No | | Yes | No | |
| | | | | | | | | | | | | |

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust

Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Type of entity (C corp, S corp, or trust) | (f) Share of total income | (g) Share of end- of-year assets | (h) Percentage ownership | (i) Section 512 (b)(13) controlled entity? | |
|--|-------------------------|---|-------------------------------------|---|---------------------------------|---|--------------------------------|--|----|
| | | | | | | | | Yes | No |
| | | | | | | | | | |

Part V

Transactions With Related Organizations

Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule

1

During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

a

Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity

b

Gift, grant, or capital contribution to related organization(s)

c

Gift, grant, or capital contribution from related organization(s)

d

Loans or loan guarantees to or for related organization(s)

e

Loans or loan guarantees by related organization(s)

f

Dividends from related organization(s)

g

Sale of assets to related organization(s)

h

Purchase of assets from related organization(s)

i

Exchange of assets with related organization(s)

j

Lease of facilities, equipment, or other assets to related organization(s)

k

Lease of facilities, equipment, or other assets from related organization(s)

l

Performance of services or membership or fundraising solicitations for related organization(s)

m

Performance of services or membership or fundraising solicitations by related organization(s)

n

Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)

o

Sharing of paid employees with related organization(s)

p

Reimbursement paid to related organization(s) for expenses

q

Reimbursement paid by related organization(s) for expenses

r

Other transfer of cash or property to related organization(s)

s

Other transfer of cash or property from related organization(s)

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

1s

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

| (a) Name of related organization | (b) Transaction type (a-s) | (c) Amount involved | (d) Method of determining amount involved |
|-------------------------------------|----------------------------------|------------------------|--|
| | | | |

Schedule R (Form 990) 2014

Part VI **Unrelated Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.
Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a) Name, address, and EIN of entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Predominant income (related, unrelated, excluded from tax under sections 512-514) | (e) Are all partners section 501(c)(3) organizations? | | (f) Share of total income | (g) Share of end-of-year assets | (h) Disproportionate allocations? | | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (j) General or managing partner? | | (k) Percentage ownership |
|---|-------------------------|--|--|--|----|------------------------------|------------------------------------|--------------------------------------|----|--|-------------------------------------|----|-----------------------------|
| | | | | Yes | No | | | Yes | No | | Yes | No | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R (see instructions)

| Return Reference | Explanation |
|------------------|-------------|
|------------------|-------------|